PHILIP MORRIS US

Marlboro
World Championship Team

RRESPONDENCE
ORK, NY 10017-5592

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All data compari ecified.

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- PM volume f notional shipments and Basic 75 d increasing as volume for t as.
  - PM Volu ores, with share flat at 33.8.
- Marlboro volume, down from last week's peak in C-stores, was +38% above four weeks ago.
  - Although 5 for 3 volume was minimal this week, representing about 2% of Marlboro's current week's volume compared to 13% during the prior week, Marlboro volume trend has been increasing since Marlboro Adventure Team activity expanded to include new MAT II catalogues, high value carton coupons ($3, $4 or $5) plus bonus miles offer in a late April FSI, April ROP, Direct Mail, and the van program which began May 1 offering incentives for multiple pack or carton purchases.
  - Significant amounts of Marlboro most likely for the Leadership program were shipped to various chains during the past few weeks including Thrifty and Loaf-n-Jug this week, and Diamond Shamrock the previous week.
  - Marlboro volume is appreciably stronger in Retail Masters outlets, +41% above the previous four weeks compared to 30% in non-masters stores.
- Volume for PM's other premium brands have been increasing in C-stores over the past four weeks with gains ranging between +3% and +6% for Merit, Parliament, Virginia Slims and B&H as various promotions have been offered at retail, and via FSI and Direct Mail.
- PM Discount volume declined vs. week ago as Basic shipments to Sam's Wholesale Clubs fell following heavy 75¢ carton allowance product supplied during the prior week.
  - PM Discount was -7.1% below the previous four weeks in volume in the Wal-Mart aggregate, with share down -1.0 point to 12.2%. Basic holds 5% of the chains sales. In contrast, RJR's Discount business was -3.1% lower in volume and -0.7 points in share to 16.8%. Their Best Value and Monarch brands have a 9.5 share.
  - PM's Discount volume within C-stores declined -3.7% in volume and -1.2 points to 4.0 share. Basic, which represents about half of PM's Discount business was also below previous levels on a four week basis: -2.4% in volume and -0.6 points to 2.1 share. For the latest five week period, 23% of stores received shipments of Basic.

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Source: https://www.industrydocuments.ucsf.edu/docs/hrvk0004